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# TOURISM

CANADA'S TOURISM MONTHLY

December 2003

Michele McKenzie takes the helm at the CTC

Recovery could be on the way

Winter travel intentions mixed

*Discover our true nature*

CANADIAN  
TOURISM  
COMMISSION

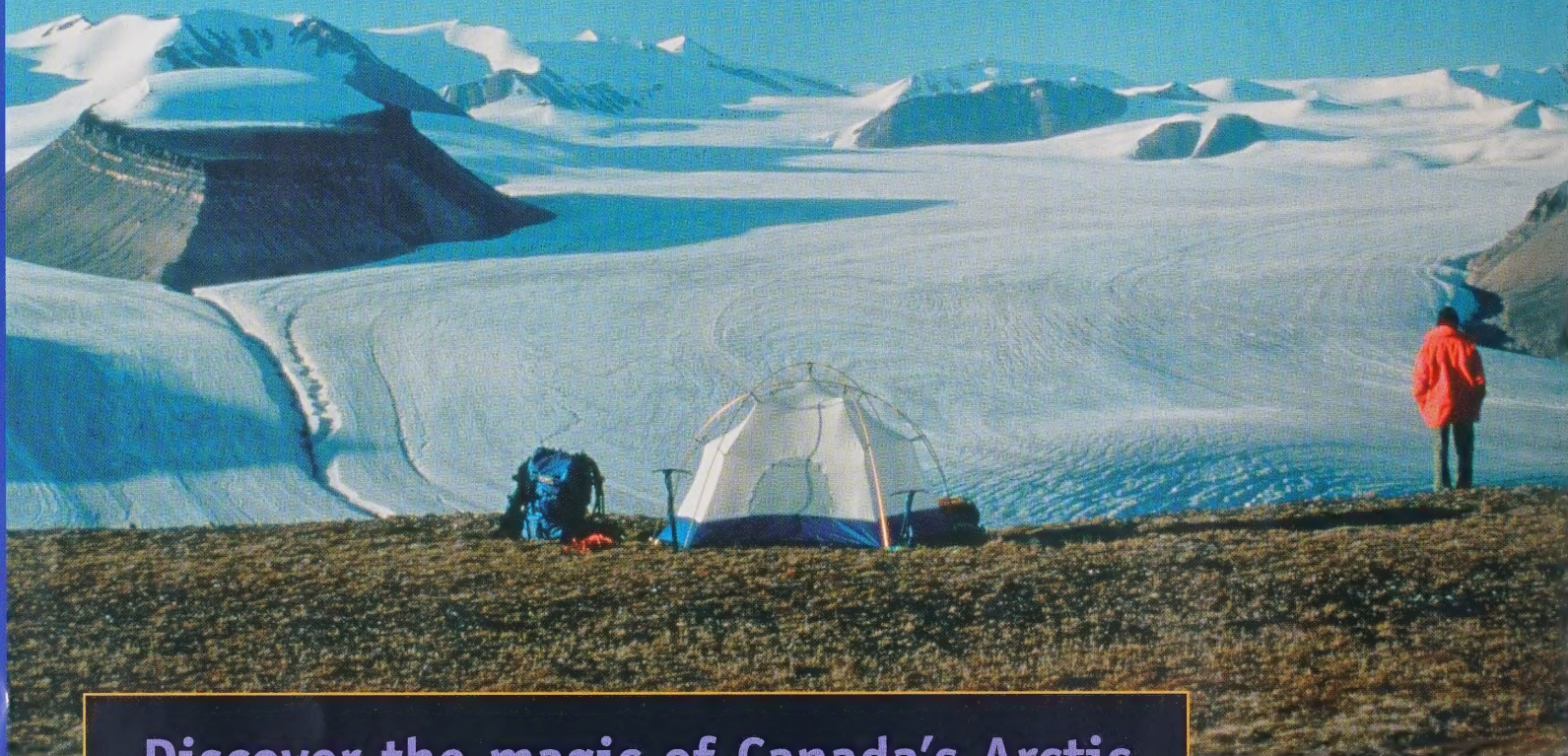


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# TOURISM online – an integrated communications vehicle

As announced in the September issue of *TOURISM*, the Canadian Tourism Commission (CTC) will deliver a final printed version of the magazine in December 2003 and formally launch *TOURISM* online by January 2004.

In an effort to streamline and integrate its communications vehicles, the CTC will bring together *TOURISM* online, its Daily Tourism News e-mail and the newly revamped corporate Web site, [canadatourism.com](http://canadatourism.com).

*TOURISM* online will incorporate a daily news component and include the monthly magazine section with news and analysis on marketing initiatives, travel trends, industry issues, and the tourism programs and activities of the CTC and its partners. Additionally, *TOURISM* online will be linked to the CTC's official business site, [canadatourism.com](http://canadatourism.com), which will provide links to much of the in-depth information highlighted by the magazine.

We believe this will be of significant benefit to you, our readers. It will ensure that you are provided with the most up-to-date industry information available to assist you in making key business decisions, particularly in response to quickly changing market conditions.

And remember, *TOURISM* online will be proactively delivered to subscribers via e-mail. If you have not already provided us with your e-mail address, we encourage you to do so by sending your contact information to [tourism@ctc-cct.ca](mailto:tourism@ctc-cct.ca).

Questions or comments should be forwarded to Isabelle Des Chênes, Director of Communications at the CTC: [deschenes.isabelle@ctc-cct.ca](mailto:deschenes.isabelle@ctc-cct.ca). ❄️



On the cover: Winterland.  
Photo: Steven Ferlatte, courtesy of the Canadian Tourism Commission.

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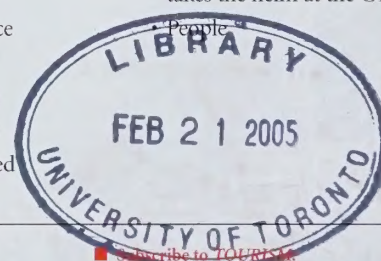
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## New CTC publications

- Co-operation and Partnerships in Tourism: A Global Perspective - 50253E
- Risk Management Guide for Tourism Operators - 50128E
- Finding Funding: Ten steps to meet your financial needs - 50221E
- Cuisine in Canada - An Appetizer - 50317E
- Passages to Innovation - A Dynamic Interactive Planning Tool for Tourism Product Developers in Canada - 50312E

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**Mission:** Canada's tourism industry will deliver world-class cultural and leisure experiences year round, while preserving and sharing Canada's clean, safe and natural environments. The industry will be guided by the values of respect, integrity and empathy.

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## Editorial

### Are we wintering well?

by Peter Kingsmill

"Are you wintering well?" It's the perennial question that harkens back to Canada's roots as a rural nation, asked of neighbours one has not seen for a while who share the common challenges of snow, cold, and often isolation.

When it comes to tourism, coping with winter in Canada is at least as problematic as daily living was a century ago. To be sure, winter affords outstanding opportunities for unique outdoor activities and memorable social gatherings alike; most Canadians take the chilly season in stride, and many embrace it with enthusiasm. Skiers rejoice, winter festivals and holiday shopping are indeed memorable experiences, and judging from the numbers of international visitors snowmobiling across our white landscapes or carving turns on our ski hills, traditional winter pursuits have not lost their favour.

But not everyone thinks that finger-numbing cold, slippery roads and slushy sidewalks are good reasons to visit, or travel in, Canada. For example, we have welcomed many new Canadians over the past few decades from places where winter is somewhat less, well, spectacular! While most of our new neighbours adapt comfortably to our interesting climate, it is likely that few of them recommend winter as the season for family and friends to visit from their countries of origin, and we know that "VFR" (visiting friends and relatives) are very significant tourism generators.

Similarly, it should come as no surprise that winter is a little tough to sell to our closest neighbours (and largest tourism market) in the northern tier American states. Like Canadians – unless they are winter activity aficionados and especially if they are seniors – most people are looking for a break from the cold.

We are what we are, of course, and for several months of the year we are "winter country". Many winter tourism products are hugely successful, but they are very much "niche" products, whether heavily capitalized (ski resorts, for example) or unique, small entrepreneurship like most dogled-ding experiences. And, a number of our festivals are internationally renowned for the sheer enjoyment and celebration of all that is Canada between the winter and spring solstices.

When it comes to promoting Canada as a four-season destination, winter is indeed challenging. We have to love it (or at least put up with it graciously!) Not everyone does, and therein lies the problem.

Nonetheless, to all of our colleagues in this fascinating industry, at home and around the world, we extend our best wishes for the traditional holiday season and a truly better year ahead! 🍁

Peter Kingsmill, Editor-in-chief



Michele McKenzie takes the helm at the Canadian Tourism Commission. See full article on page 14 and watch for an exclusive interview with the new CTC president in the January issue of TOURISM online.

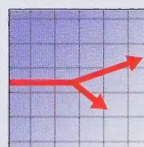


Judd Buchanan, founding chairman of the Canadian Tourism Commission (CTC), has been awarded the first-ever Travel Press Lifetime Achievement Award at the TIAC Awards, in recognition of his leadership in the creation of the CTC as a national-level private-sector-led tourism marketing partnership.

[www.tiac-aitc.ca](http://www.tiac-aitc.ca)



Delegates to the World Tourism Organization's (WTO) 15th General Assembly in October gave unanimous approval to transforming the WTO into a United Nations specialized agency. All that remains is approval of an agreement by the UN General Assembly. [www.world-tourism.org](http://www.world-tourism.org)



The World Tourism Organization publication *Tourism Highlights* shows that changes in market behaviour and a weak world economy are dictating tourism trends. Although international tourism enjoyed an almost three per cent growth in 2002, international tourism receipts did not follow as the pressure on prices continued. [www.world-tourism.org](http://www.world-tourism.org)

## Letters to the Editor

I was very interested in the editor's comments in the October issue of *TOURISM*, regarding "Taking Autumn Seriously", and would like to share Tourism Moose Jaw's experience.

In late spring 2003, Tourism Moose Jaw relocated its visitor centre. Our building signage and eye-catching moose statue has not yet made the move, and our highway

signage program is awaiting major upgrading.

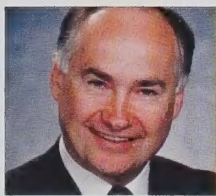
In spite of the resulting low profile, over 1500 visitors came through the doors in September. They represented 6 provinces, 21 American states and 10 countries besides Canada and the U.S. They were predominantly members of the 50-plus crowd, with lots of time and (more to the point) lots of money!

Those visitors lamented that many attractions and most visitor centres close shortly after Labour Day. Some thought themselves lucky to find a place to fill up with water and drain their tanks. Our September experience strongly suggests that Autumn travellers would be appreciative and loyal to services that remained open until Canadian Thanksgiving.

Operators and visitor centres who have the potential to offer down-sized services with skeleton staff should evaluate that option. Moose Jaw's experience suggests that it could be profitable. 🍁

Wayne Gamble  
Moose Jaw





## At Issue

by Randy Williams

# What is, versus what could have been

As we look back on a very difficult year for Canadian tourism, I wonder to what degree our industry's ability to weather the "perfect storm" is attributable to the advocacy and lobbying conducted by various organizations on the industry's behalf. Indeed, many *TOURISM* readers own or work for businesses that belong to one or more associations whose mandate is to look out for the industry as a whole, or sectors within it at local, provincial/territorial and national levels.

The focus of this column has been, and will continue to be, current issues affecting Canada's tourism industry. But as we stand at the threshold of a new (and hopefully more positive) year, I want to take the opportunity to examine the role of industry associations in helping tourism businesses deal with these sorts of issues.

All businesses face both internal and external threats. They invest every day in dealing with internal matters such as staffing, training and facility maintenance. However, external threats such as new competition, economic trends and government legislation, while equally important, are too often neglected in the belief that little can be done.

Joining and participating in advocacy organizations that listen to their members (and reflect their beliefs in their principles, policies, and leadership) is about the only action businesses can take to safeguard themselves externally. An industry association leverages its members' strength in numbers by serving as their collective voice, bringing to bear the staff expertise necessary to do so effectively. Advocacy associations must assist individual tourism businesses to manage change and confront external influences.

There is a challenge, of course: the effect of advocacy is impossible to measure or quantify. After all, how do you determine the net difference between what is and what could have been? At a time when businesses are focussed on the return on investment for each cost decision, measuring the return on membership fee expenditures, in quantitative terms, is important to them. If associations could measure the value of advocacy as clearly as the value of advertising and marketing can be measured, I am convinced that no representative association would need to look at revenue-generating programs to fund its core advocacy agenda.

In part, the value of advocacy is hard to measure because associations cannot always reveal the substance of discussions and negotiations, in the interest of maintaining positive working relationships. An example is when a government official consults an association on an initiative being considered, and the association learns it would be damaging to the industry. If the association succeeds in having it modified or cancelled, and communicates that success to its membership, the government could be cast in an adversarial role and would never consult the association again in advance of contemplated initiatives.

It's important to recognize that the effects of advocacy are no less real or valuable because they cannot be measured in dollars and cents. Membership and participation provide direct benefits and a positive return on investment to individual businesses and to the industry as a whole. 🍁

Information: [rwilliams@tiac-aitc.ca](mailto:rwilliams@tiac-aitc.ca)

## Tourism meetings in the spotlight

Canada's federal, provincial and territorial tourism ministers got together at the end of October to find ways to turn around the country's lingering negative image from this year's long list of plagues. There are plans for a new fund to finance these efforts, although details are not yet available; ministers are to send proposals to federal Industry Minister Allan Rock by mid-December. Rock has said he will ask for federal monies in next year's federal budget.

"The two days were very well spent," says the Canadian Tourism Commission's Patrick Gedge, who attended. "We can expect to see unprecedented cooperation and a new national focus on tourism." While at the meeting in Québec City, the ministers agreed to establish a council of ministers with a framework for consultation. [www.ic.gc.ca](http://www.ic.gc.ca)

It was a month for high-level tourism meetings. The Tourism Industry Association of Canada (TIAC) annual conference was held at Montréal less than a week before the meeting of ministers. TIAC president Randy Williams told the 400 or more delegates that he feels "cautious optimism" is the watchword for the travel industry in the year ahead. He acknowledged 2003 has been the most difficult year for Canadian tourism in four or five decades, but said there are signs on the horizon that recovery may be just around the corner.

And the tourism industry's best were recognized at the first National Tourism Awards held in conjunction with the TIAC conference. Winners included the Quebec Bus Owners Association, recognized for its cooperative effort with the CTC to integrate culture and tourism at the *Bienvenue Québec* tradeshow and marketplace. [www.tiac-aitc.ca](http://www.tiac-aitc.ca) 🍁

## Our members are all over the map.



## But speak with one voice.

The Tourism Industry Association of Canada is the national voice of the tourism sector and the source of information and development for tourism professionals from coast to coast. If you and your business are part of this vital and thriving industry, join us, let your voice be heard, and benefit from our innovative member programs and events.

Visit online for more information at [www.tiac-aitc.ca](http://www.tiac-aitc.ca)



Tourism Industry Association of Canada  
Association de l'Industrie Touristique du Canada





## Traditional structure at work on The Rock



Photo: Courtesy of Newfoundland and Labrador Tourism.

In this sky, the fall of darkness brings the day's best light.

The provincial tourism marketing budget in Newfoundland and Labrador (NL) is one of only a few in Canada that are still administered principally by a government ministry (the Department of Tourism, Culture and Recreation) within a conventional departmental structure headed up by a deputy minister (Gary Norris) and assistant deputy minister (Vic Janes).

In the 2001/02 fiscal year, the province's total core marketing budget was \$4.1 million, and increased to \$5 million for fiscal year 2002/2003. The province also participates in partnerships for marketing initiatives that can access money from several federal and federal/provincial government programs to supplement the core-marketing budget, within program guidelines.

The department participates in regional tourism through the strategic tourism product development division. This division supports tourism planning and coordination efforts, and works with regional economic development boards, the eleven regional tourism associations, and other stakeholder groups as necessary.

In September, 2003 the department established the *Newfoundland and Labrador Tourism Marketing Council (NLPMC)*. The current


fifteen-member council has been appointed for terms of up to three years; an application process will be held in 2005 to select new members. The NLPMC now works as an industry advisory body to the department with a mandate that includes marketing planning, marketing the province in external markets in Canada and internationally, and marketing program performance measurement, as follows:

- assist the department with preparing strategic plans and annual marketing plans,
- monitor the implementation of marketing programs,
- assist the department with sponsor and industry marketing partnership initiatives,
- report annually to the minister and to the tourism industry on the marketing programs and their results.

Industry-led *Hospitality Newfoundland and Labrador (HNL)* is the lead advocacy group representing private tourism operators in the province. HNL undertakes research and prepares briefs and position papers to all levels of government, and has been effective in lobbying for change in regulations, legislation, and government policy that impact the tourism industry. The association has been actively involved with a number of issues

including air and marine access, highway signage, and the provincial tourism marketing budget.

HNL supports the development of the NLPMC. "This is a much anticipated step for the advancement of the tourism industry in this province," says Stan Cook Jr., HNL's president. "The Council will

ensure that tourism owners and operators, who work in the marketplace every day, provide an important perspective to the tourism marketing strategies and will encourage a more business-like approach to the decision-making process." 

Information: [www.gov.nl.ca/tourism](http://www.gov.nl.ca/tourism) and [www.hnl.nf.net](http://www.hnl.nf.net)

## The four pillars of financial reporting

You are past being intimidated by the fundamentals of accounting: great! You have a good idea of the importance of financial planning: congratulations! You know why you should analyze financial statements: excellent. Now, do you know how to analyze them?

*Profiling Your Financial Statements*, the second guide in the *ABCs of Financial Performance Measures and Benchmarks for Canada's Tourism Sector* series examines financial statements more closely.


Financial statements are used to analyze financial performance and capital structure. They include the income statement, the statement of retained earnings, the balance sheet and the statement of cash flows. These documents are essential as all four statements are published in a company's annual report.

The income statement outlines the financial performance of a tourism establishment. It shows the flow of revenues and expenses during a given period, whether an operation is profitable, and how much profit it generates.

The statement of retained earnings describes the financial structure of a business. It shows the amount of income retained since the business was created and identifies income earned and dividends paid during the current operating year, and the amount of earnings remaining in the business at the end of the period.

The balance sheet is considered a snapshot of a company's financial position or financial condition. The upper portion of the balance sheet shows what a business establishment owns while the lower portion shows what a business owes to its creditors and shareholders.

Lastly, the statement of cash flows indicates the amount of cash coming from profits and investments and the amount that was invested to purchase capital assets.

This financial guide illustrates how the statements apply to particular business settings, using a fictional tourism enterprise. Step by step, or literally line by line, the reader is led through individual statements and instructed on how they function. To help in the analysis of the different statements, the guide is complemented by a comprehensive glossary. The guide is available at [www.canadatourism.com](http://www.canadatourism.com). 



# So, just how was **your** year?

Over the past several years, each spring we have asked tourism businesses and destinations how their summer season was shaping up. Similarly, each autumn we contact people across Canada to see if summer met or exceeded expectations. This year, in light of world, national, and regional events, researcher Victoria Herman asked our contacts to put this past summer into a broader perspective.

According to destination marketing organizations across Canada, the year has been "a mixed bag of tricks". A slow start early in the season presented a grim picture of what may lie ahead: early July saw a 35 percent decrease in American travellers at eastern border crossings, the impacts of which were felt in the accommodation sector until at least mid-July. "People wanted to travel, but it took time for current events to blow over before travel plans were ventured into," states Roberta Sawchyn, manager of the Best Western Nor'Wester Resort Hotel in Thunder Bay. "We did see some recovery in late July and through August."

Heather Gregg, manager of tourism marketing partnerships with Kingston Economic Development Corporation (KEDCO), felt the Kingston area may have fared better than some of the larger centers that were hit hardest. While the lull was felt everywhere, a gradual but strong recovery trend has resulted in a banner year for some properties. While a few did report a decrease (average 12-14 percent), Gregg notes, "we can't complain too much with these numbers in a year such as this. We've been quite fortunate." Local properties that have experienced growth during this period include the Frontenac Club Inn and the Four Points by Sheraton. Both properties have indicated that room nights are up 15 and 7 percent respectively over 2002 numbers, according to Anne Marie Harbec, manager of visitor services at KEDCO.

Paul Pinchbeck, director of marketing and consumer insight for Blue Mountain Resort at Collingwood, Ontario, says May and June "really sent them for a loop." Summer was a bit of a challenge, and although they did have more room nights booked than last year, American business is down about 50 percent

from where it was. "Going into fall it's still soft but last-minute bookings are coming in," says Pinchbeck. "We are fully focused on winter now; our winter business is crucial."

Catherine Leclerc, marketing director at Mont Tremblant north of Montréal, says that summer was definitely down, though the golf courses did "just okay". Winter bookings are coming in and, following a pattern seen elsewhere in Canada, "winter will be something to look forward to this year!"

In Truro, N.S., the situation was similar. At one three-star motel, early July delivered an almost complete shutdown of visitors and online inquiries, lasting until nervous travellers regained confidence and started moving. The rest of the summer met expectations.

June was a good month for Charlottetown, PEI, propelled by conventions as well as record attendance levels for the Festival of Lights. Then, while July was relatively soft and slow to take off, fall visitation has been strong due to excellent weather. At Founders' Hall, one of Canada's newest heritage attractions, visitation is reported as being on par with last year. Unfortunately, early visions of a banner year from increases in advance group bookings were offset by a soft leisure market.

Out west, Garry Smith, manager of the Red Deer Lodge in Red Deer, Alberta is also seeing signs of a recovery this fall and winter. Summer saw a dramatic decrease in leisure travel and sports teams to this newly renovated facility. As Smith says, "it's been a rough summer and the fall recovery trend is a welcome encouragement to the industry at large."

The Discovery Inn in Yellowknife, NWT, was hit hard this summer, with visitation numbers down about 30 percent. Many of the inn's clients are motorists passing through, and this summer "they just weren't travelling," says manager Edward Tic. He says autumn and winter bookings are coming in and recovery has begun, however, and is confident this trend will continue.

Tourism Nanaimo's manager of marketing and leisure travel,



Photo: Steven Ferlatte, courtesy of the Canadian Tourism Commission.

According to destination marketing organizations across Canada, the year has been "a mixed bag of tricks".

Hannah Shoop, was very upbeat when asked how summer 2003 was for Nanaimo. "It was wonderful, best on the island!" she exclaimed. "Numbers are up and tourism is alive and well." Tourism Nanaimo's monthly statistics report for August/September 2003 notes that the number of "backyard tourists" is increasing, with people choosing their own province for a "close to home getaway". And, September saw a welcome and reassuring increase of visitation from the U.S. (50 percent over the same period in 2002).

Marie Sperling, at Pioneer Country Market in Kelowna, B.C., reports that numbers were already down

early in the season. Any hope that they would have picked up in mid-season was snuffed out by the forest fires which plagued the B.C. interior.

Parks Canada's Bill Aris told *TOURISM* that while not all units across Canada have reported at time of writing, those units that account for 70 percent of the visitation volume in an average year suggest that National Parks are down three percent from last year, and National Historic Sites are down eight percent. The decrease has been attributed to a range of factors including SARS, western fires, war in Iraq, terrorist threats, border crossing delays, and West Nile virus. 🍁

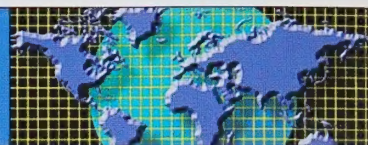
## Historic cities

Mayors and representatives of cities from around the world gathered in Montréal for the 8th *World Conference of Historical Cities*, signing a declaration recognizing and supporting the special characteristics of historical cities. The declaration emphasizes the cities' responsibility "for recognising, conserving, enhancing and propagating the natural and built heritage of our neighbourhoods and our cities."

The declaration also agrees to publicly announce the principles that will guide decisions regarding heritage conservation and enhancement, and to work in collaboration with other public authorities and the United Nations Programme for Human Settlements. 🍁

Information: [www2.ville.montreal.qc.ca/vieux/2003/eng/declara.htm](http://www2.ville.montreal.qc.ca/vieux/2003/eng/declara.htm)





## Untangle the Web

by WorldWeb Travel Guide

*I'm interested in redesigning my Web site. Any tips?*

Your Web site is a vital marketing tool. As such, it's important that it be both visually appealing and effective. Here are four important rules to keep in mind when tackling your next Web design project.

### 1. Develop a *blueprint*:

It's surprising how many Web sites lack simple organization. To avoid this problem, create a detailed blueprint of your site that outlines who you are, where you are located and what you sell. Try to look at your site from an outsider's perspective.

### 2. Keep it *simple*:

The number of animations, typefaces and colours should be kept to a minimum. Too many flashy elements will give your site a cluttered, amateur feel. Even worse, a busy Web site prevents readers from finding the information they're looking for.

### 3. Provide *quality information*:

Make sure the information about your products and services is up-to-date and easy to find. Not only does good quality content help your potential customers, it can improve your search engine rankings.

### 4. Create *user-friendly navigation*:

Web site navigation should be logical and consistent. If your site currently relies on graphic buttons for navigation, it's important to provide an alternative. Navigational text links at the bottom of each Web page are a non-obtrusive and effective way for customers and search engine 'robots' to navigate your site. 🍁

*WorldWeb Travel Guide is a travel-planning Web site offering online advertising, and Web site hosting & design services. info@worldweb.com*



## GoMedia Canada Marketplace coming to Montréal

The Canadian Tourism Commission (CTC) and the Tourism Industry Association of Canada (TIAC) have signed a partnership agreement that paves the way to organize the first *GoMedia Canada Marketplace*, involving more than 150 journalists. About 75 Canadian and 75 international journalists will be invited to meet with Canada's media and public relations tourism industry representatives over a two-day period on May 4-5, 2004 in Montréal.

"We know that, in past years, the media component of Rendez-vous Canada has fallen well short of its potential, with only perhaps 30 media in attendance," admits TIAC's David Ostiguy. "We are very excited by the *GoMedia Canada Marketplace* because it will draw over a hundred and fifty international and Canadian travel writers to

meet directly with public relations experts, not simply sales representatives. And the "fam" component will be marvellous!"

The *GoMedia Canada Marketplace* will be similar to the very successful U.S. Media Marketplace, which alternates between New York and Pasadena (California) annually. Media will book a series of 12-minute meetings with participating partners, building new travel story ideas about Canada. Following the meetings, the media delegates will be invited to participate in a pre-selected media tours in various locations in Canada. Registration closes December 31, 2003 and space is limited. 🍁

Information: [dostiguy@tiac-aitc.ca](mailto:dostiguy@tiac-aitc.ca) or [gomediacanada@ctc-cct.ca](mailto:gomediacanada@ctc-cct.ca)

## U.K. activity points to growth

There are signs of strength in the United Kingdom market. Thomas Cook Signature, voted best long haul U.K. tour operator for 2003, sent 100 of its top-selling travel agents to Vancouver in November for an orientation of the city. Tourism Vancouver highlighted Vancouver's best products and services in a three-day educational overview to secure business for 2004 and beyond.

Small and medium sized tourism businesses from each province and territory were well represented at one of the largest travel industry shows in Europe. A copy of the *Canadian Tourism Resource Guide* was made available to every Meridian Club member at the World Travel Market in London, U.K. in November. The reprint edition of the

guide featured a special Tourism Toronto insert and cover; much of the guide's focus is on new and emerging product that previously has not had a platform upon which it could be showcased. The business-to-business publication is distributed to wholesalers and packagers in the U.S., Europe, Asia and in Canada. 🍁

Information: [ohman@sympatico.ca](mailto:ohman@sympatico.ca).

*For the information of readers doing business in the U.K., the Canadian Tourism Commission office in London will be moving out of Canada House into new offices located on Trafalgar Square; telephone numbers will also change. For full details go to [www.canadatourism.com](http://www.canadatourism.com).*

## Tastes of Canada partnership

FritoLay (snack foods) has launched a second round of its Tastes of Canada program with two new flavours: Cape Breton Sea Salt & Pepper and Toronto College Street Pizza. The program, initiated with only an in-kind contribution (product development staff time) from the Canadian Tourism Commission (CTC), increases awareness of travel in Canada through links to the [www.travelcanada.ca](http://www.travelcanada.ca) Web site, contests, and promotes Canada's chefs and local flavours. The CTC also receives access to the FritoLay contest database. 🍁



# Winter travel intentions mixed

The Canadian Tourism Research Institute (CTRI) from the Conference Board of Canada provides updates on the results of the quarterly Travel Intentions Survey to corporate and executive members of the CTRI. The following article was graciously provided by CTRI, and draws directly from their October, 2003 Members' Briefing draft, providing an overview of the *Winter 2003-04 Vacation Market*.

During our previous *Travel Intentions Survey* (conducted in June 2003), we found the exchange rate did not seem to be a significant factor in influencing Canadian travel intentions over the summer. However, it appeared to play a larger role in shaping travel intentions for the upcoming winter season. While our latest *Travel Intentions Survey* (conducted in September 2003) did not specifically focus on the influence of exchange rates, historical precedence shows Canadian travel patterns are strongly linked to exchange rates, or more appropriately to exchange rate fluctuations.

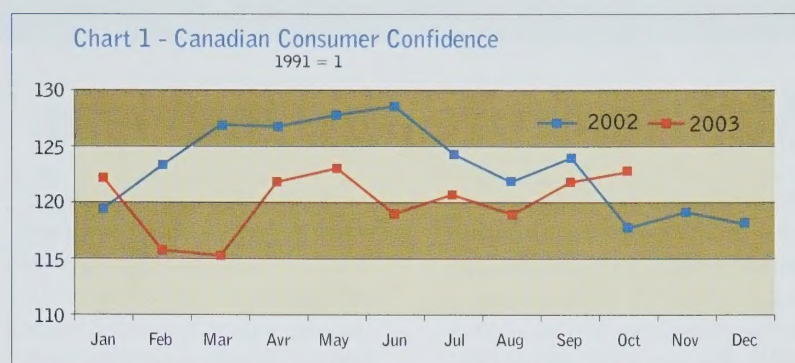
With that in mind, it is somewhat perplexing to find that our latest survey reports fewer Canadians plan on travelling outside Canada this winter, including travel to the U.S., compared to the intentions reported back in 2002. While the exchange rate against the U.S. dollar has increased from September 2002, economic concerns and high consumer debt levels may also be part of the reason for the conservative responses.

In fact, Canadians have generally not felt as confident as they did last year. However, since the survey was completed we have witnessed a further appreciation of the Canadian dollar (against U.S. currency) and consumer confidence has also improved (see Chart 1). These factors are expected to help spur Canadian outbound travel over the winter.

Meanwhile, the latest *Travel Intentions Survey* suggests domestic travel intentions for the winter are, for the most part, expected to remain solid. This is good news for the industry, which has come to rely increasingly on the domestic marketplace due to the ongoing fall-off of international travel markets. While we feel more Canadians will be influenced by an appreciating Canadian dollar (since the time of the survey), we do not expect an offsetting decline in domestic travel plans. What must also be remembered is that the outlook for the up-coming winter season is potentially even more promising (compared to last year) because of improving economic conditions and the fact that last years escalating uncertainty regarding the war in Iraq hampered winter travel season.

Overall, the results of our survey indicated 39.0 percent of Canadians were likely or very likely to take a winter vacation this year – down marginally compared to 2002 (see Table 1).

The slight decline in intentions does not necessarily suggest fewer trips will occur this winter, but likely reflects an industry-wide trend of consumers taking a more wait-and-see attitude towards travel planning and travel booking. Whereas in the past travellers would plan their holidays three months in advance, now they typically book much closer (even within the month) to the time they intend to travel. Our survey confirms that the bulk of winter travel bookings are expected to occur in November and December – very close to actual trips dates.



**Table 1 - Winter (November-April) Vacation Intentions**  
(Percent of Canadians intending to take a Vacation)

	2003	2002
Winter Vacation Intentions (all destinations)	39.0	42.3
Canada	19.4	19.6
US	8.2	9.0
Other International	10.7	13.0
Do not know / Refused	0.7	0.7

Source: The Conference Board of Canada

**Table 2 - Province/Region respondent will be spending the most nights in**  
(Percent of Canadians that plan to travel within Canada during the winter)

Province / Region	2003	2002
Ontario	27	30
Quebec	26	21
Alberta	11	15
BC	20	14
Saskatchewan / Manitoba	7	8
Atlantic Canada	10	10
Don't know	1	1

Source: The Canadian Tourism Research Institute

While overall domestic travel intentions are comparable to last year, intentions to visit Ontario and Alberta decline. Our latest survey indicates that nearly half (49.7 percent) of all intended trips will be domestic. This is up 3.4 percentage points from last year. While Ontario – the most populous province in Canada – is still expected to generate the greatest number of domestic leisure trips this winter, it is also one of the destinations where Canadians have indicated declining intentions to visit, compared with last year (see Table 2).

While our survey indicates that domestic travel intentions to Ontario and Alberta this winter both declined (compared with last year), the largest declines were registered in different household income brackets. For Alberta, the biggest declines were registered for Canadian households in the \$40K-\$60K bracket, while for Ontario destined travel, Canadian households with incomes of over \$60K were the

income bracket most impacted. On a positive note, the recent upward trend in consumer confidence is significant, going into the critical booking period for travel this winter. Last year, the industry battled increasing uncertainty surrounding the war in Iraq and declining consumer confidence. While travel intentions appeared strong in September 2002, many of those travel plans did not materialize. With the war in Iraq over, and the health concerns of SARS now faded, for the moment extraordinary events are not expected to play a significant factor in affecting consumer confidence as we head in to the winter travel season. In addition, the economic consensus suggests conditions are poised to improve.

Undeniably, the industry remains hopeful that these winter travel intentions materialize, so that 2004 starts off on a positive note. 🍁

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## Multiculture and tourism

The decades-old vision of Canada as a multicultural society has arguably become a reality. That vision reflects, in part, a history of welcoming immigration from diverse cultures, and in part (a very substantial part) the notion that Canadians choose not to follow the “melting pot” ideal of immigration and assimilation that is often considered the American model, but rather to celebrate cultural diversity. This celebration is not without blemish; the media reminds us daily of the frailty of our vision, with allegations of racial profiling by police in cities as widely scattered as Halifax, Toronto, Vancouver, and even Saskatoon. Too, the post-9/11 era has made enhanced national security a continental issue, with the resultant threats to our own, very Canadian, immigration policies.

What has all this to do with tourism? To begin with, our cultural tourism product is entirely a reflection of our cultural heritage. Consider our aboriginal roots, add in a more-or-less equal measure of anglophone and francophone settlers, blend the result with over a century of more-or-less open immigration policies, and we have a recipe for cultural enjoyment and learning experiences that is quite extraordinary even in our increasingly globalized society. The Canadian Tourism Commission's (CTC) former cultural tourism sub-committee recognized this in its report, *Packaging the Potential*.

The stories of Canada that are shared through cultural attractions and events can be as intense as the 65-year-old celebration of Gaelic language, music and dance found at Cape Breton's Gaelic College of Celtic Arts and Crafts, or as relaxed and hospitable as a First Nations' pow wow on the prairies. There are dark sides, too. The former immigration quarantine station at Grosse-Île on the St. Lawrence River near Québec City is a national historic site that carries a heavy burden, especially for the families of Irish immigrants, over 5000 of whom died from disease and were buried at Grosse Île in 1847 alone. Ruth Goldbloom, a spokesperson

for the Pier 21 Society in Halifax, is well aware that the current desire to connect with one's familial roots will continue to drive tourists to facilities such as hers well into the future. (Indeed, connecting with family is a net tourism generator for our country; in 2002 there were 273,000 more overnight trips taken by visiting friends and relatives coming into Canada when compared to Canadians travelling outside the country for the same reason. Our relatives are more likely to visit us in Canada than the other way around, a significant point when pondering the tourism benefits of our diverse heritage.)

Special places like Pier 21, Grosse-Île, and even the Gaelic College, offer far more than those snapshots of our varied cultures - however colourful and memorable - that we experience at festivals and events. An appreciation of a culture's music, dance, and art is richly enhanced when we understand the history of that culture's involvement in our country and our society.

Cultural tourism thinker Jeremy Morgan, a member of the CTC's cultural tourism committee during the development of *Packaging the Potential*, wrote, “Heritage is not a catalogue of what is dead and gone, but the texture of daily life and the constant creation of a rich and valuable future.” During a recent conversation, he told *TOURISM* magazine that our multicultural heritage predisposes us to be “credible hosts to diverse cultures”; as we have encouraged and appreciated the variety of culture within our own population, so too we can offer our guests that same understanding and celebration, irrespective of their origins. Morgan also emphasized the importance of “engaging the host” when considering the development of heritage-based tourism. He suggests that successful cultural tourism destinations must reflect a “pride of place” through the local, special knowledge of people who come into contact with guests. Understanding our own roots is essential to providing a first-class experience. 🍁

## Pier 21: multicultural portal

Pier 21. A bustling immigration facility from 1928 until its closure in 1971, the huge building stands along the waterfront of Halifax harbour and was in a state of disrepair by the mid-eighties. During its years of operation, Pier 21 received nearly one million immigrants, refugees, displaced persons, war brides (often with their youngsters) and British evacuee children. To these people, Pier 21 was the first glimpse of their adopted country. They went on to contribute to Canada's economic and social landscape, but Pier 21 was a place of good-byes, too. Through World War II, about 480,000 service personnel departed from Pier 21 en route to an uncertain future in war-torn Europe.

J.P. LeBlanc, a former immigration officer, decided that the deteriorating building was too important a part of Canada's social history to let it go to ruin. LeBlanc recruited a woman named Ruth Goldbloom to help turn the building's fortune around, and now a new chapter in Pier 21's story is being written.

Goldbloom pursued an aggressive fundraising campaign over a four-year period. Through national partnerships and with overwhelming alumni support as well as contributions from all three levels of government, a \$7 million rebuilding dream would become reality for the Pier 21 Society. On Canada Day 1999, *Pier 21 National Historic Site* opened with national attention. The interpretive centre's high-tech interactive displays trace the journey that newcomers would have taken to immigrate to a new country; the facility stands as an emotional tribute to those who helped shape Canada.

Four years later, Pier 21 has received national and international recognition, including “Best New Attraction in Canada”. Even in 2003, and despite low visitation to other sites, visitor statistics have been positive for Pier 21. Last summer, two large 50-year reunions to Pier 21, organized by the Dutch and Portuguese communities who celebrated 50 years in Canada, were instrumental in generating an overall increase of 15 percent in visitation, with Ontario and Alberta yielding the highest visitor numbers.

Recognizing that Pier 21 had a somewhat limited – if passionate – appeal (immigration to Canada between 1928 and 1971), and would suffer from a low rate of repeat visitation, the society undertook a review with Halifax's Economic Planning Group to do an analysis of the future sustainability of Pier 21 and develop a five-year strategic plan. Now, Ruth Goldbloom and her team are back at bat, raising funds for the expansion of Pier 21 to enable it to appeal to new markets, ensuring its longevity as a national icon of Canada's multicultural society. 🍁

## Multicultural roots by Sally Cole

Well before traditional Celtic music was experiencing its current revival, Prince Edward Island was there with a lively Celtic music scene. Now, visitors from around the world are keen to learn more about musical roots and Celtic culture, and there is no better place than PEI, which claims the highest proportion of residents with Irish or Scottish heritage outside the British Isles.

While the roots run deep and the Island musical traditions are strong, it hasn't hurt any that a whole new wave of visitors has expressed interest in the culture. Where a decade ago, a ceilidh at the Irish Hall in Charlottetown might have attracted some local fiddle fans, now the hall fills up quickly with people from all over. A recent survey of the audience at a late September ceilidh revealed visitors from every province plus more than ➔



## Multicultural roots

continued

20 states. What could provide a more authentic tourism experience than sitting back on hard plastic chairs in the Irish Benevolent Society Hall and enjoying 18-year old fiddler Cynthia MacLeod as she banters with her guitar-playing accompanist and fiddles up a storm. Add in a chance to get up and try some Irish Country dancing or "set" dancing and a second act by four young women performing traditional and original harmonies and you have a real \$8 bargain. (And in case you are wondering, a *ceilidh* – pronounced *kaylee* – is an informal social gathering featuring traditional Scottish or Irish stories, songs and dances.)

West of Charlottetown, the College of Piping and Celtic Performing Arts in Summerside hosts the *Come to the Ceilidh* series Monday to Thursday. "The college puts on a great show of music, song and dance with a pipe band, highland dancers, step dancers and traditional music. Our ceilidhs really show off our students," says Scott MacAulay, bagpipe instructor.

During peak season, it's possible to "kaylee on" seven nights a week and more in musical Prince Edward Island. 🍁

Information: [www.peiplay.com](http://www.peiplay.com)

## Planning for recovery

by Frank Bourree, CMC

The past two years have proven to be challenging and "stormy" times for tourism operators. As we move towards recovery, good planning will be essential to the success of your business. Planning involves deciding what needs to be achieved, how it will be done, when and by whom it needs to be done, and how progress will be gauged.

Through planning, tourism operators can focus on and establish the intent of their business, gather the information needed to evaluate business strengths, weaknesses and opportunities, and develop long-term strategies that capitalize on strengths and mitigate risks.

Finally, they can develop short-term operating plans identifying resources and activities to be used to meet strategic goals.

Here are the key steps in developing a strategic plan, as well as the key questions tourism operators must ask themselves:

**1. Establish a vision, mission and goals for your business.** Questions to ask yourself include:

- ✓ Describe your business in five-years' time.
- ✓ What are you doing to position yourself for the future?

- ✓ What are your plans for future expansion or growth?
- ✓ What is unique about your business that makes a customer want to deal with you?
- ✓ Are you looking to diversify your business by expanding into new products (services) or geographic regions?

**2. Conduct an external assessment.**

This assessment relates to socio-economic trends, changes in the mix and profile of your market, new technologies, and political and tourism industry issues that may affect your business. Questions to ask yourself include:

- ✓ What actions have your competitors taken recently that may impact upon your future?
- ✓ What actions do you expect from your competitors and how might they influence your future?
- ✓ What do your customers think about your product or service?
- ✓ How will recent economic events affect your business in the future?
- ✓ What pressure is the current business climate having on your business?

**3. Conduct an internal assessment.**

This assessment examines the leadership, culture, structure, operations and resourcing of your business. Questions to ask yourself include:

- ✓ How are things going with your business?
- ✓ What are the major changes needed so that your longer-term business goals can be achieved?
- ✓ What are the barriers and challenges to accomplishing your goals?
- ✓ What challenges do you face managing your cash flow?
- ✓ What is it that worries you most about your information technology?
- ✓ What market research or development do you do?
- ✓ What does your business do really well?
- ✓ What would you like to improve about your business?
- ✓ What aspects of your business are not as profitable as you would like?
- ✓ What aspects of your business could be more efficient?
- ✓ Where do you see potential areas for productivity improvement?
- ✓ What is keeping you awake at night?

- ✓ What are the risks that could negatively affect the achievement of your goals?
- ✓ What are the key programs, policies, procedures, processes and systems within your business? How well are they working?

**4. Develop strategies, actions and accountabilities.**

These strategies and actions will "bridge the gap" between the current and future or desired state of your tourism business. When developing strategies and actions, ask yourself the following questions:

- ✓ What were the major accomplishments of your business in the last year?
- ✓ What does your business need to accomplish in the next year?
- ✓ What will you accomplish easily and what will be more of a struggle?
- ✓ How can you get more from your employees?
- ✓ How satisfied are you that you have identified the main risks in your business and have developed appropriate safeguards? Consider risks related to physical assets, business partners, technology, workplace safety, internal and external fraud, and others.

**5. Develop performance measures.**

These measures can be qualitative as well as quantitative and can be used to determine the success of your strategies and action plans. Ask the following questions when establishing performance measures for your business:

- ✓ How do you measure success for your tourism business?
- ✓ What benchmark information do you have available? What do you use?
- ✓ What internal indicators do you look at to assess your longer-term financial prospects?
- ✓ What external indicators do you look at to assess your longer-term financial prospects?

With good planning your future can be much sunnier! 🍁

Frank Bourree is a partner with Grant Thornton LLP and a full-time consultant to the tourism industry. He sits on the board of directors of Tourism BC.

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## Trans Canada Trail

### Québec

Population:	7,455,200
Area:	1,540,680 km²
Trans Canada Trail	1,200 km

"Throughout my childhood, Canada was always perceived as a more beautiful, unspoiled version of New Hampshire and Maine."

John Irving, American author raised in New England

Near Val David, in the Laurentians, snowmobile enthusiasts enjoy a sunny day on the trail.





## The Research Viewpoint

Australian market has huge potential by Stuart MacIsaac

It is no secret that this has been a lean year for the tourism sector in Canada. The numbers describing the dip in tourism traffic from all our major markets (particularly those outside of Canada) are still surprising.

However, as was reported in recent short-term *Business Outlooks* (BO), there are markets with good potential for the immediate future, including Australia. Like the Mexican market, Australia does not provide many visitors in absolute terms (the number of visitors from Australia and Mexico are roughly the same) but it could be a real source of growth.

Our recently released report on Australia, *Australian consumer research 2002* (volumes 1, 2 and 3) paints a picture of a mature market that leaves you enthusiastic about its potential. Some highlights include:

- of the Asian-Pacific markets, Australia is one of the youngest, most active and wealthy, with 28 percent of the market aged between 25 and 34;
- despite the Internet, people in this market still book their trips well in advance, with only 21 per cent booking trips less than a month in advance of departure, indicating that traditional marketing methods can work here;
- Australians make long trips to Canada – the average trip length with Canada on the itinerary is 42.2 nights, of which 22.6 nights are spent in Canada;
- there is a high interest in Canada, with 71 percent of study participants expressing an interest in visiting Canada some time over the next five years.

There is much more, including a marked rise in appreciation for Canada as a destination among travellers who have already visited. In the same way Canadians going down under enjoy the exoticism of the local flavours and cultures, Australians coming here enjoy the scenery, local people, and notably take an interest in Canadian aboriginal culture. And Canada earns high points with the skiing crowd.

Some of the barriers to overseas travel are covered, and these include the distance and cost involved, family commitments, the cold weather and the perception that Canada seems very similar to the country they live in.

Among the barriers to visiting Canada, though, one jumps out, and that is simply a low awareness of Canada as a destination. In the international tourism marketplace, we are now competing against other destinations, and our competitive positioning is weak. Overcoming this, and raising Canada's profile in this market, are the challenges which have the potential to yield a huge payoff for the Canadian tourism industry, if we have the chops to capitalize on it.

The report was done at the request of the Asia Pacific marketing committee, which worked extensively with the CTC's Roger Laplante. It is a benchmark study, meaning that it is the most detailed look at this market we have, and will be used for the next five to ten years. It is already being used by our marketers to help shape their campaign to meet this market. The campaign has already begun. 🍁

## Recovery could be on the way

The *Winter 2004 Business Outlook* shows moderate signs of tourism recovery in Canada. The *Business Outlook* is developed by the Canadian Tourism Research Institute (CTRI) on behalf of the Canadian Tourism Commission (CTC). Highlights are as follows:

### North America

The Canadian travel suppliers and receptive agent bookings suggest continued growth with an overall 2.5 percent rise in overall advance bookings for domestic travel for the first quarter of 2004, compared to the previous year. Consumer confidence will help drive Canadians to travel; leading the growth will be domestic leisure group bookings, increasing by 3.5 percent, while domestic FIT leisure travel is expected to increase by 2.0 percent. Business bookings are also expected to register some growth, at 3 percent.

Despite renewed U.S. economic growth and additional monetary

stimulus, the outlook for U.S. travel to Canada in the first quarter of 2004 is for a 1.5 percent decline over last year. The appreciating value of the Canadian dollar appears to be hurting, however there is evidence that late booking patterns are becoming more and more common, indicating that bookings may pick up as the first quarter approaches. The outlook for U.S. group leisure travel suggests a 4.0 percent drop, the highest among all segments measured. Business travel is expected to drop by 2.5 percent while independent travel will also drop slightly (0.5 percent).

Mexico is still experiencing a slow-down in economic growth, largely due to weaker U.S. demand. Since the inception of NAFTA, the health of the U.S. economy has become an important factor in determining economic prospects in Mexico. For winter 2004, the outlook suggests a modest 1.5 percent increase in travel to Canada.

### Europe

Trends suggest the U.K. market is ready to travel again. The outlook suggests overnight travel from the U.K. next winter will increase 3.2 percent compared to last year. The outlook for group leisure travel shows an increase of 4 percent while the FIT leisure travel segment is expected to grow by 3.0 percent.

In France, the outlook indicates that there will be an overall 3 percent increase compared to last year, where both FIT and group leisure travel are expected to experience 3.8 percent and 2.8 percent growth respectively. The outlook for Germany is positive, despite a flat economy. Overall travel is expected to see 3.5 percent growth, with German group leisure travel expected to post the highest gain (4.5 percent) while FIT travel should expand by 3.5 percent.

### Asia/Pacific

The outlook for Japanese travel in the first quarter of 2004 indicates

an overall 3.3 percent rise. Leisure group bookings will lead growth at 4.5 percent while FIT leisure travel should rise by 3.0 percent.

An economic recovery is underway in the rest of Asia, initiated by a post-SARS rebound. All CTC's target markets from non-Japan Asia are expecting to post positive growth, led by China (5.0 percent), followed by South Korea (4.0 percent), Hong Kong (3.0 percent) and Taiwan (2.8 percent).

Despite a strengthening currency and airline capacity issues on the trans-Pacific route to the West Coast of Canada (which are inhibiting the outbound market to some extent) advance bookings to Canada point to an increase in the first quarter of 2004 of 3.3 percent. 🍁

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# A MONTHLY GUIDE TO TRAVEL AND TOURISM DATA

TOURISM ACTIVITY	REFERENCE PERIOD	QUANTITY	% CHANGE FROM PREVIOUS YEAR
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## TOURISTS TO CANADA

From the U.S. - Total	January-September 2003	11,533,778	-13.7
By Auto	January-September 2003	7,462,212	-15.3
By Non-auto	January-September 2003	4,071,566	-10.7
From Overseas - Total	January-September 2003	2,652,952	-16.0
United Kingdom	January-September 2003	578,086	-5.6
Japan	January-September 2003	191,657	-42.5
France	January-September 2003	226,174	-12.7
Germany	January-September 2003	222,139	-11.5
Hong Kong	January-September 2003	71,102	-26.8
Australia	January-September 2003	122,494	-1.3
Taiwan	January-September 2003	49,358	-41.3
Mexico	January-September 2003	119,106	-11.4
Korea (South)	January-September 2003	111,175	-10.1

## OUTBOUND CANADIAN TOURISTS

To the U.S. - Total	January-September 2003	9,950,451	-4.0
By Auto	January-September 2003	6,000,254	-4.1
By Non-Auto	January-September 2003	3,950,197	-3.9
To Overseas - Total	January-September 2003	3,956,860	6.4

## EMPLOYMENT IN TOURISM

Total Activities	Second Quarter, 2003	579,600	-1.2
Accommodation	Second Quarter, 2003	133,700	-3.2
Food and Beverage	Second Quarter, 2003	137,600	-3.6
Transportation	Second Quarter, 2003	80,600	2.6

## SELECTED ECONOMIC INDICATORS

Personal Disposable Income per person (\$)	Second Quarter, 2003	22,726	0.5
GDP at market prices (current, \$ billion)	Second Quarter, 2003	1,206.6	-0.4
GDP chained (1997, \$ billion)	Second Quarter, 2003	1,089.8	-0.1
CPI (1992=100)	September 2003	122.7	2.2

## EXCHANGE RATES (IN CDN\$)

American dollar	October 2003	1.3218	-16.2
British pound	October 2003	2.2198	-9.7
Japanese yen	October 2003	0.0121	-4.7
EURO	October 2003	1.5485	0.0

Note: All tourist estimates deal with trips of one or more nights; all data on this table is not seasonally adjusted.

Sources: Statistics Canada and the Bank of Canada.

## Travel volumes remain low

Inbound travel volumes remain low for the eighth consecutive month. Total international overnight visitation fell 12 percent in September 2003 compared to one year earlier. The declines registered in September are not as severe as those registered in the previous months, May being the lowest.

With international overnight travel to Canada down 14.2 percent over the first nine months, overnight travel from the U.S. dropped 13.7 percent, continuing eight consecutive months of decreases in the volume from the U.S.

Decreases were registered in both automobile (-15.3 percent) and non-automobile modes (-10.7 percent)

September marked the seventh consecutive monthly decrease in overnight trip volumes from overseas regions, having recorded a 15.1 percent decrease over September 2002. Europe and Asia-Pacific led the decline, down 12.6 percent and 22.5 percent respectively. South America was down 3.7 percent. 🍁

Information:  
[www.canadatourism.com](http://www.canadatourism.com)



## Winter works well for adventure market

Canada is well known for its range of outdoor winter activities and therefore, *Winter Outdoor Activity Participants* were among some of the activity-based market segments identified in the CTC's new series of *TAMS (Travel Activities and Motivation Survey)* analysis.

The reports focus on Canadians and Americans who have taken leisure trips to Canada and have engaged in winter outdoor activities when on recent trips. As such, they have included at least one of the following activities on these trips:

- ❄️ ice climbing
- ❄️ dog sledding
- ❄️ ice fishing
- ❄️ snowmobiling
- ❄️ cross-country skiing

NOTE: Winter outdoor sports participants may also have engaged in downhill skiing or snowboarding while on their travels, but the alpine winter sports are *not* used to define the group.

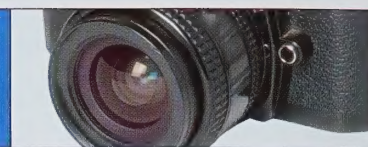
Key findings:

- There are 3.6 million adult Canadian and 15 million adult American winter outdoor activity participants. Canadian travellers appear to have a stronger outdoors and winter orientation than do their American counterparts. Among winter outdoor travellers with recent leisure travel experience in Canada, there were 3.1 million Canadians (representing the second largest segment with recent travel in Canada) and only 3.7 million Americans (the second smallest segment).
- On both sides of the border, there was an extremely strong overlap between winter outdoors and soft outdoor adventure enthusiasts. American winter outdoor participants were also extremely likely to be heritage enthusiasts.
- While only 18 percent of the U.S. adult population resides in tier 1 states (border states), and 33 percent of American travellers to Canada reside in these states, 41 percent of winter outdoor participants live near or on the border. There is clearly a challenge in attracting these travellers from long haul states.
- Winter Outdoors participants were somewhat more likely to be male than female and were younger than the average traveller to Canada. Among the Canadian segments analysed, travellers who engage in other winter activities were the least affluent. However, the American group had higher than average incomes.
- Compared with other activity-based market segments, there is less foreign competition for both Canadian and American winter outdoor activity participants.
- The Canadian winter outdoor activity group was one of the most homogeneous of all segments, with more than 9 in 10 being Canadian-born. This will have significant influence on future market potential with Canada's population growth being fuelled by immigration.

While the actual rate of growth of this segment is expected to be positive over the next twenty-five years, it is going to grow at a slower rate than it would have if the population structure were to remain the same. Changes in the range of amenities and services offered by tourism businesses may be required to better accommodate the needs and interests of an ageing population. 🍁

For more information on Canadian and American Winter Outdoor Activity Participants, visit [www.canadatourism.com](http://www.canadatourism.com) to download the full report.





The first annual **PricewaterhouseCoopers 2003 Alberta Tourism Survey** shows 91 percent of the province's tourism businesses and organizations feel increased marketing and additional financial resources are the most critical elements to industry improvement and progress. At the same time, the survey found 59 per cent of survey respondents believe the Alberta government to be the key player in improving the industry. Travel and tourism is the fourth largest industry in the province, according to the provincial government, generating over \$5.2 billion in revenues and about \$620 million in direct and indirect taxation revenues in 2002.

BSP ONELink has appointed **Travel & Tourism Solutions (TTS) Inc.**, based in Ottawa, as its distributor for Canada. "We believe that the Canadian market has tremendous potential for us," said Roger Emsley,

managing director of the U.K.-based operating company.

**Grouse Mountain ski resort** has donated \$35,000 to the Red Cross' B.C. Forest Fire Response Fund, saying it recognized the need to support those who were victimized by the fires in B.C.'s interior last summer, even though the fires did not threaten or damage the resort or surrounding area.

"The way Canadians travel is changing dramatically and when it comes to skiing, it's now about the entire holiday experience, not just the number of double black diamond runs at a particular hill," says Richard Savage, director of ski programs for the **Merit Travel Group**. "Canadians today want to go on a ski trip that is enhanced by a variety of experiences relevant to their stage in life." ❄️

**Meg Meng-hua Cheng**, formerly a project accountant with Oxfam Canada, has joined the finance group at the CTC... **Rick Traer**, CEO of the Canadian Sport Tourism Alliance, has been elected vice president of the Association of Pan American Sports Confederations for 2003-2007... **Kavin R. Schieferdecker**, formerly director of hotel sales at the San Antonio (Texas) Marriott Rivercenter & Riverwalk Hotels, has been appointed director of sales and marketing at the Vancouver Marriott Pinnacle Hotel.

**Peter Elmhirst** (Elmhirst's Resorts at Keene, Ontario) will chair the board of directors of the Tourism Industry Association of Canada for the 2003-2004 term. He will be joined by vice-chairs **Ken Lambert** (Delta Hotels and Resorts) and **Wayne St. John** (APR Ltd.), both of Toronto... **Jim Bradley**, MLA for St. Catharines, Ontario, has

been named Minister of Tourism and Recreation.

For a third consecutive year, Tour East Holidays president **Rita Tsang** has been recognized by Profit Magazine as one of Canada's Top 100 Women Business Owners... **Karen Squires** has been appointed director of marketing for the Ottawa Tourism and Convention Authority following three years of tourism marketing and communications consulting nationally and three years as director, Canada Leisure Programs and Partnerships for the CTC... **Paul Shelley**, MLA for Baie Verte, has been appointed Minister of Tourism, Culture and Recreation for Newfoundland and Labrador.

**Tina Wehmeir** has been appointed executive director, Meeting, Convention and Incentive Travel Sales for the U.S. market. She will be based in the CTC's Washington, DC office. 🍁

## Michele McKenzie takes the helm at the CTC



Michele McKenzie

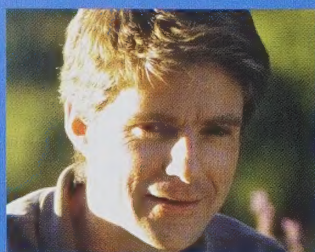
Industry Minister Allan Rock has announced the appointment of Michele McKenzie as president and CEO of the Canadian Tourism Commission (CTC). She takes over from Doug Fyfe, who had returned as president in an acting capacity in early 2003.

McKenzie, who had been Deputy Minister, Nova Scotia Department of Tourism and Culture since March 2000, has a deep and comprehensive involvement in tourism. "I would like to congratulate the search committee on the selection of such a highly qualified individual," says Rod Harris, president and CEO of Tourism BC. "Michele brings a range of skills and senior experience in tourism destination management to this important position. Her background on the board of directors of the CTC, and as Deputy

Minister in Nova Scotia, will be a valuable asset as she oversees the diverse undertakings of the CTC."

McKenzie began her career as an independent event manager specializing in association conferences and community festivals. In 1985, she was appointed manager of tourism for the City of Halifax. In 1986, she joined the Province of Nova Scotia as manager of market development with the Department of Tourism, where she held increasingly responsible roles including director of visitor services, executive director of tourism, and executive director of marketing.

Born in Hamilton, Ontario, McKenzie lived in various locations in southern Ontario before her family moved to Nova Scotia when she was 10. She graduated in 1981 as Life President of her graduating class, and recipient of the Hugh A. Noble award for Academics, Citizenship and Leadership. McKenzie was founding Chair of the Taste of Nova Scotia program, and a founding member of the Nova Scotia Tourism Partnership Council. She is a member and past co-chair of the Atlantic Canada Tourism Partnership, and served on the CTC board of directors since 2001. 🍁



Alexander Reford has been appointed to the board of directors of the Canadian Tourism Commission as the private sector representative for the province of Quebec. Reford, from Grand-Métis, Quebec, is director and president of Les Jardins de Métis Inc., and president of Tourisme Métis. 🍁



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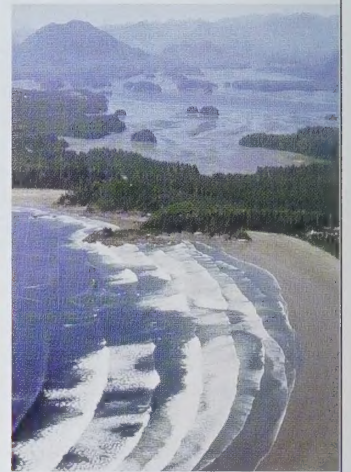
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